Benefit Event Status Report Overview

This report lists all participants in a particular process status or set of status levels. In addition, this document includes common error results shown on this report and how to troubleshoot each one.

Events go through four steps: (1) Assign Benefit Program, (2) Prepare Options, (3) Enter Elections, (4) Finalize Enrollment. An event's process status indicates what step the event is on and whether any errors have occurred for that step. For example, a status of "Assigned" indicates that the event has assigned a benefit program to the employee, but has not yet prepared the employee's benefit options, entered elections for the employee, or finalized the employee's enrollment. A status of "Prepare Error" indicates that the event assigned a benefit program to the employee but encountered an error when preparing the employee's benefit options.

This report should be run daily by the Benefit Administrators to check on Open Events and those events with a Processing Error. This report can be used to monitor events opened through Employee-Self Service.

This job aid will walk through an example of an Election Error and the steps of how to troubleshoot according to the error message shown on the report.
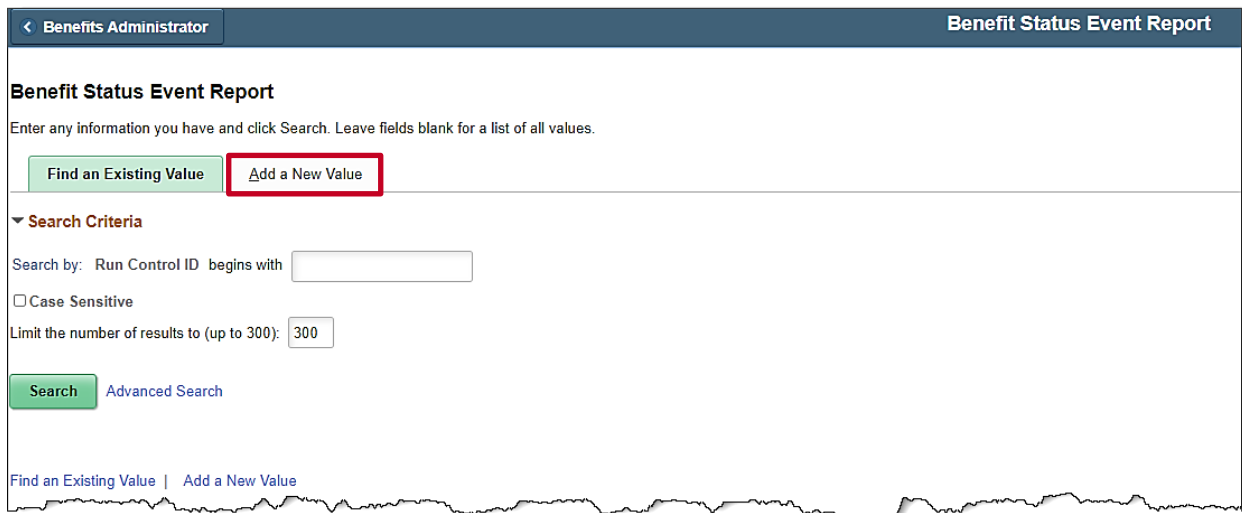
Table of Contents

How to Run the Benefit Event Status Report

Run the Benefit Event Status Report to locate employees in the various statuses. Research the event in question and intervene as applicable, so that the event can continue to move through the Ben Admin process during the next run of Ben Admin.

1. Navigate to the Benefit Event Status Report using the following path:

    Benefits > Managed Automated Enrollment >Investigate Exceptions > Benefit Event Status Report.

The **Benefit Status Event Report** Search Page displays.

Note: If the BA has a saved Run Control ID, skip to Step 5.

2. Click the **Add a New Value** button.

The **Benefit Status Event Report** Search Page refreshes.
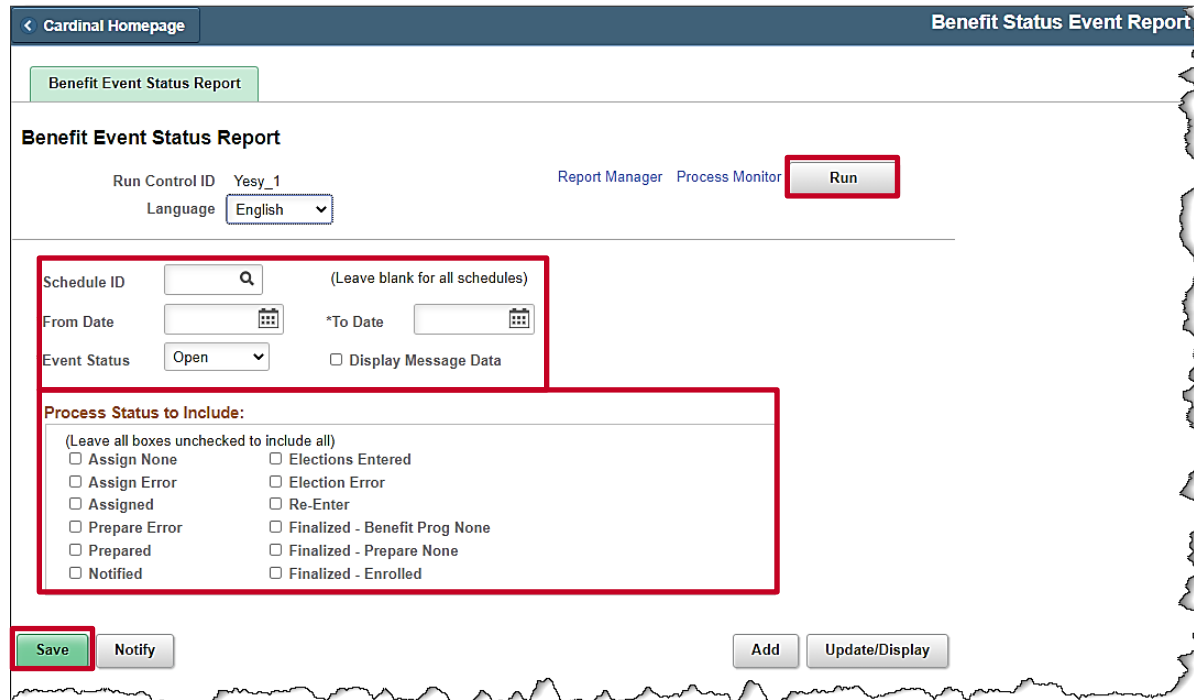
3. Enter a **Run Control ID** in the search box.
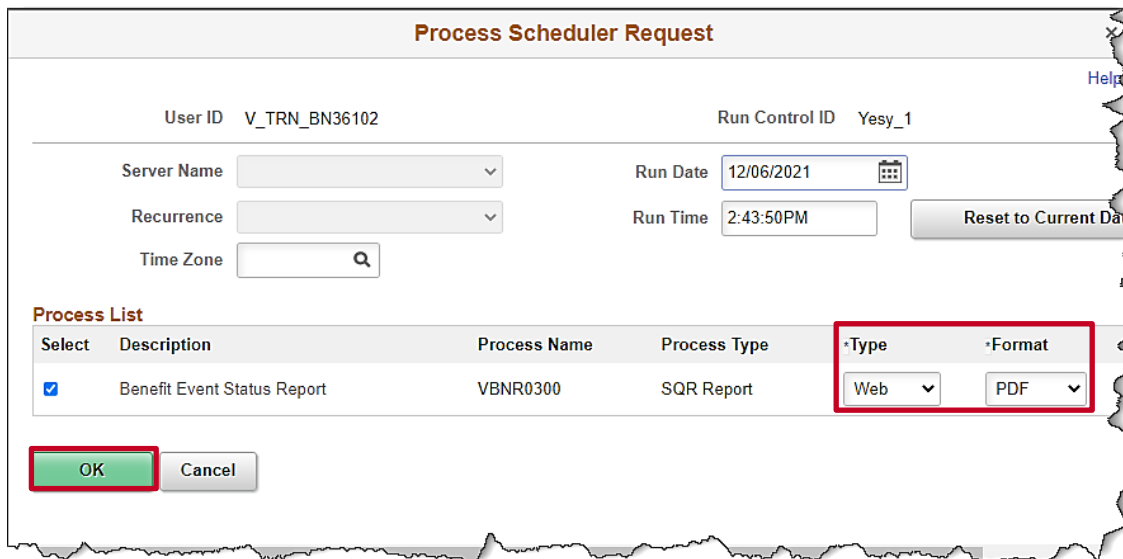
4. Click the **Add** button.

The **Benefit Status Event Report** parameters display.

5. Click on the magnifying glass next to **Schedule ID** and select the schedule ID you want to work with. Most of the time it will be **EM00** unless you are working with Open Enrollment events.

   Note: If the Agency BA is looking for Open Enrollment events, the Schedule ID would be **OE##**

6. Select a **From Date** and a **To Date** by clicking on the calendar icons or entering it into the text boxes.

7. Select an **Event Status** from the drop-down menu.

8. The BA can also select one or several **Process Statuses** to include in the report.

   Note: The **Process Status to Include** section can be left blank as well to include all statuses in the report.

9. Click **Save.**

10. Click **Run.**

The **Process Scheduler Request** page displays.
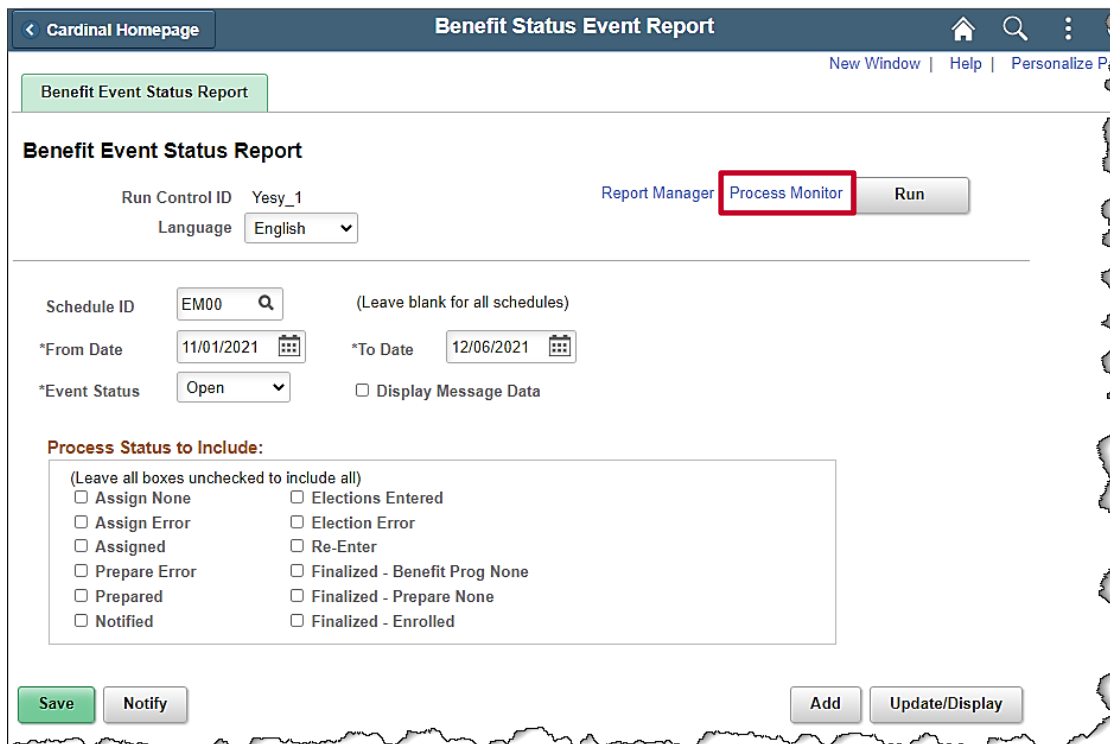
12. Select the **Type** and **Format** to run the report in.

13. Click **OK.**

The **Benefit Event Status Report** parameters page returns.

14. Click the **Process Monitor** hyperlink.

The **Process Monitor** page displays.

15. Click the **Refresh** button until the Run Status for the report is Success and the Distribution Status is Posted.

16. Click on the **Details** hyperlink next to the report.

The **Process Detail** page displays.

18. Click on the **View Log/Trace** hyperlink.

The **View Log/Trace** page displays.

20. Click on the .**PDF** output (if the format chosen was PDF).
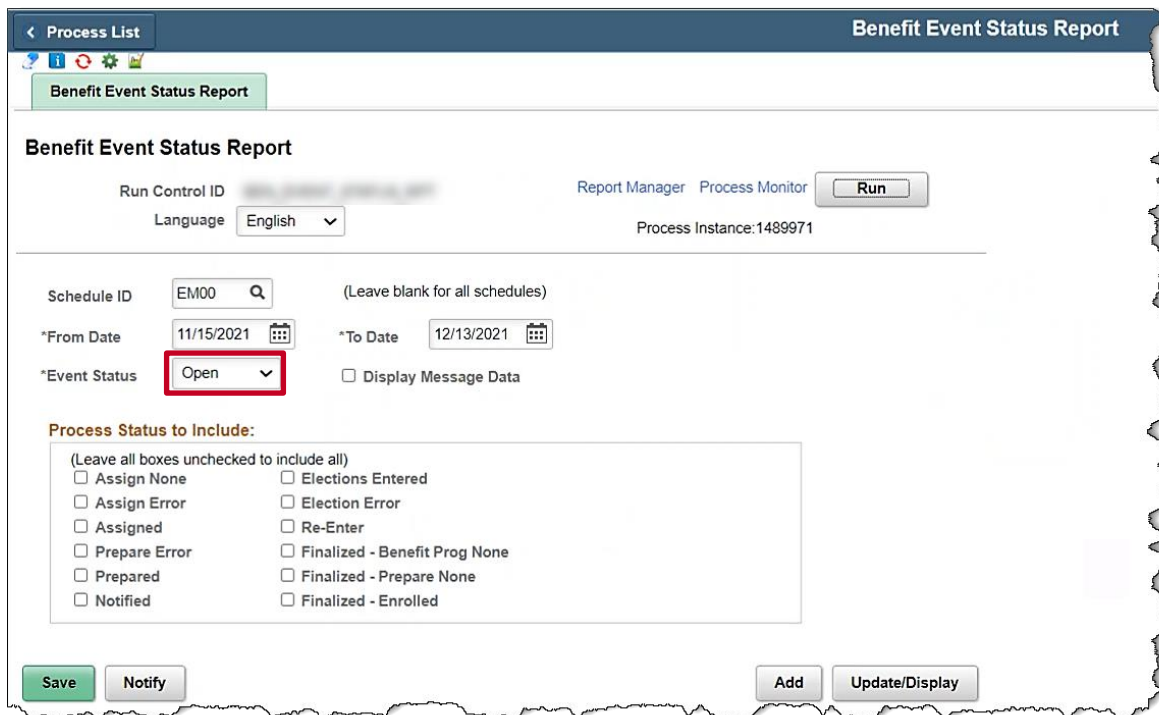
The **Report** displays in a separate tab.

Note: The report displays the **Process Status, Process Indicator,** and **Benefit Program** among other sets of data. The BA can use this information to see any open events, and what stage in the process the event is currently in. This is especially helpful for processing New Hires and tracking the status of the open events.

Viewing Open Events

To view **Open** events, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Process Status to include** section is left blank.

The **Benefit Event Status Report** parameters page displays.
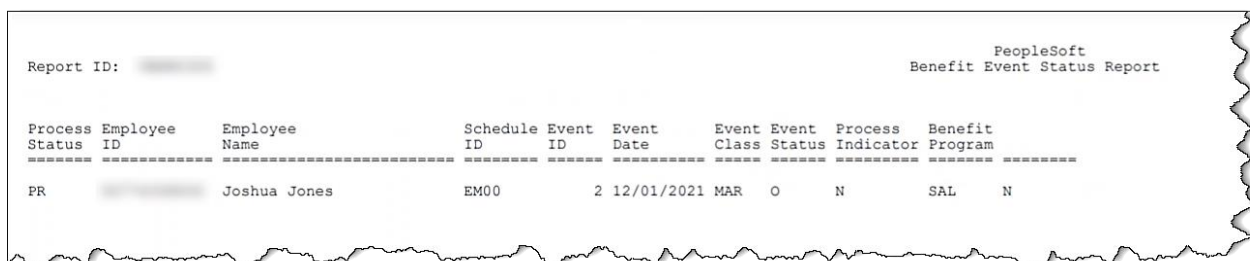
1. Select **Open** from the Event Status drop down menu.

2. Click **Save.**

3. Click **Run.**

4. Follow the **Steps 11-17** from the How to run the Benefit Event Status Report section above to run the report.

The **Report** displays in a separate tab.

Viewing and Troubleshooting Open Events with an Election Error

To view **Open** events with an **Election Error**, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Election Error** is checked off in the **Process Status to include** section.

The **Benefit Event Status Report** parameters page displays.

1.   Select **Open** from the Event Status drop down menu.

2.   Check the box next to **Election Error.**

3.   Click **Save.**

4.   Click **Run.**

5.   Follow the **Steps 11-17** from the **How to run the Benefit Event Status Report** section above to run the report.

The **Report** displays in a separate tab.

Note: The Error in this screenshot says: "The employee elected a Spending Account option but the Annual Pledge amount specified on BAS_Partic_Plan is less than the minimum allowed on the FSA Benefit Table."

6. Review the Report output and depending on the Error message different steps to troubleshoot need to take place. For this example, the BA would navigate to the On-Demand Event Maintenance Page using the following path:

Homepage > Benefit Administrator Tile > Benefits Management > On-Demand Event Maintenance.

The **On-Demand Event Maintenance** search page displays.
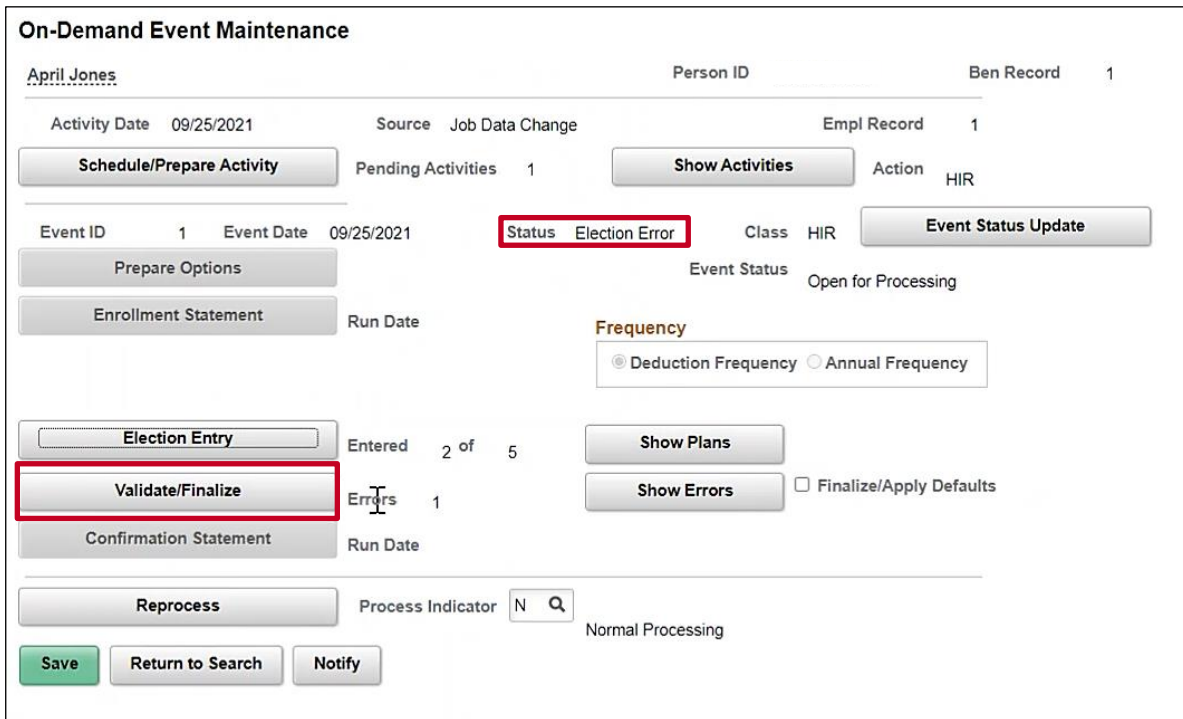
7. Enter the employee ID of the affected employee into the **Empl ID** field and click **Search**.

The **On-Demand Event Maintenance** page displays.

Note: Notice the Status of the event is **Election Error** just as it appeared in the report.

8.   Click the **Validate/Finalize** button to see this employee's errors.

The error displays in a dialog box.
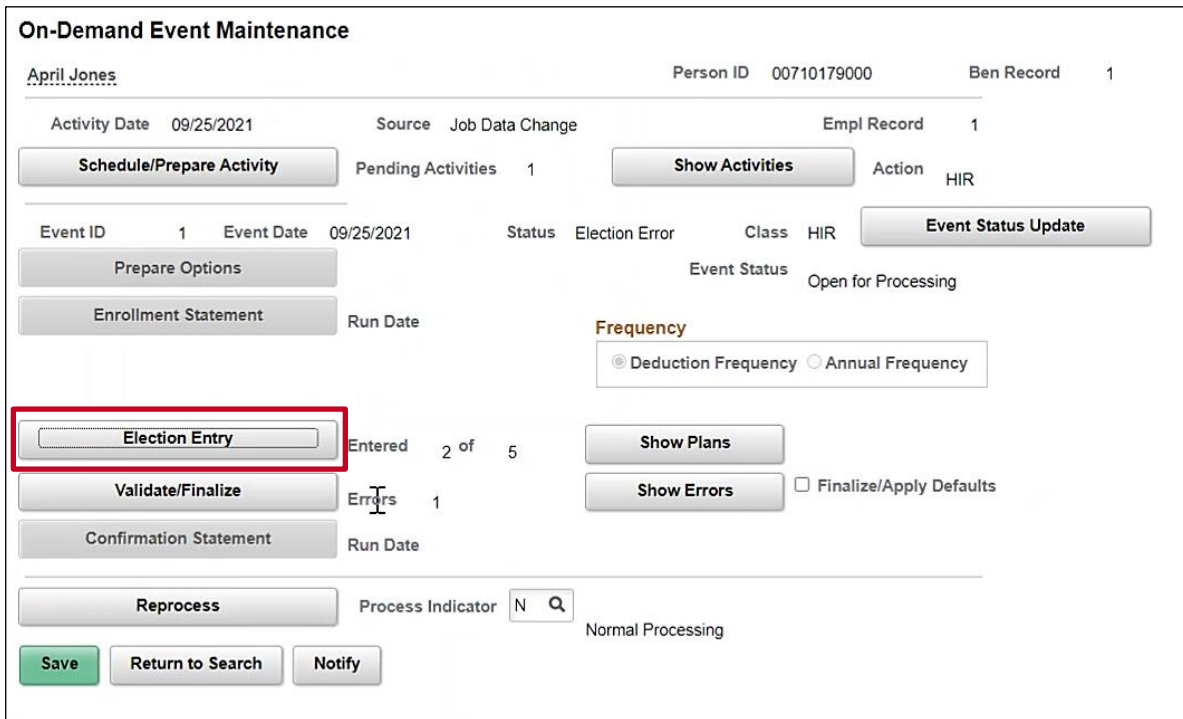

9.   For this example, the employee's spending account annual pledge is less than the minimum allowed. Click the **Return** button**.**

The **On-Demand Event Maintenance** page displays.

10. Click on **Election Entry** to view the employee's spending account annual pledge. Scroll to **Plan Type 60: Flex Spending Medical.**
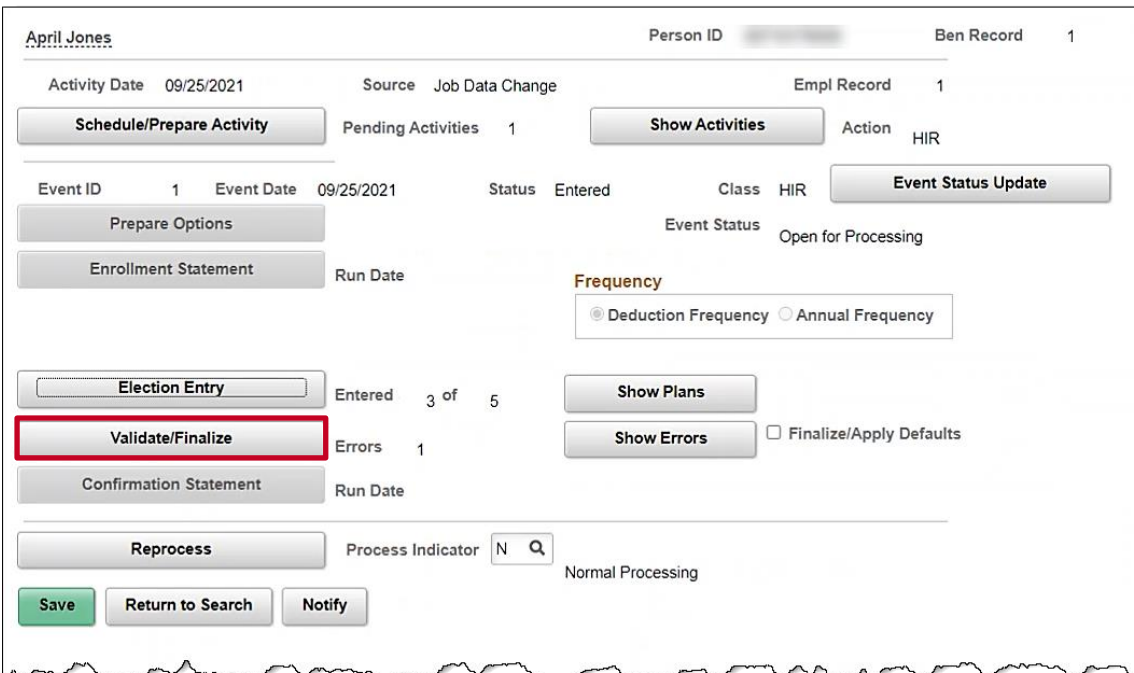
The **Plan Type 60** section displays.

Note: The employee's annual pledge of $50 is less than the Commonwealth's minimum. At this stage, the **BA** may reach out to the employee to explain the policy and ask for a revised amount before continuing with processing the **New Hire** benefit enrollment. Once the BA has collected the revised amount for the employee, continue to **Step 11**.

The **Plan Type 60: Flexible Spending Medical** section refreshes.

11. For this example, the employee has chosen to update the Flexible Spending amount to $240.00. Enter the new amount in the **Annual Pledge** text box under **Plan Type 60: Flexible Spending Medical.**

12. Confirm the **Plan Type AZ: Flex Spending Admin Fee** is elected and click **OK.**

The **On-Demand Event Maintenance Page** returns.

13. Click the **Validate/Finalize** button.

The **On-Demand Event Maintenance** page refreshes.

14. Confirm that the **Status** is Finalized-Enrolled and the **Event Status** is Closed to Processing.

    Note: The BA has fixed the Election Error for this example by updating the Annual Pledge for the employee.